



CLIENT DISCOVERY & BUSINESS REQUIREMENTS QUESTIONNAIRE

Business Launch Research & Roadmaps

Purpose: This questionnaire captures the information needed to understand your business, objectives, location, activities, and launch requirements so Atlandiascope can scope the appropriate research and roadmap.

Instructions: Answer as completely as possible. Use “N/A” where appropriate. If uncertain, identify the uncertainty rather than guessing. Supporting documents may be requested where relevant.

1. CLIENT & PROJECT IDENTIFICATION

Legal name of individual or existing business

Preferred business name / DBA / trade name

Primary contact person and role

Preferred phone number

Preferred email address

Best time for contact

Preferred days: _____ **Preferred time range:** _____

Time zone

Preferred follow-up correspondence method

☐ Phone call ☐ Email ☐ Microsoft Teams meeting ☐ No preference

If Teams is preferred, provide the email/account associated with your Teams access

Is this a new business, existing business, expansion, relocation, acquisition, restructuring, or new business activity?

What specific outcome do you want this engagement to accomplish?

Target launch, opening, expansion, or operational date

What deadlines are imposed by a lease, funding source, contract, investor, seasonal market, or other external event?

What decisions have already been made, and which remain open?

What is currently preventing you from moving forward?

2. BUSINESS CONCEPT & ACTIVITIES

Describe exactly what the business will do on a normal operating day.

What products or services will be offered? Identify each major revenue-generating activity.

What will the business manufacture, process, sell, distribute, store, transport, install, repair, or provide?

Will the business handle, store, prepare, alter, import, export, or dispose of regulated, hazardous, controlled, perishable, biological, chemical, combustible, or otherwise sensitive material?

Will customers visit the premises, or will services be delivered remotely, at customer sites, online, or through another channel?

What activities will occur on-site versus off-site?

Which activities are essential to revenue generation, and which are optional or future-phase activities?

Are you planning to add products, services, equipment, locations, or regulated activities within 1–3 years?

What could cause the business to require a different license, permit, facility, staffing model, or regulatory treatment?

3. OWNERSHIP, ENTITY & MANAGEMENT

What legal structure currently exists, if any? (Sole proprietorship, LLC, corporation, partnership, nonprofit, or other.)

If an entity exists, provide formation state, formation date, EIN status, and ownership percentages.

Who owns the business and what are their respective roles?

Who has authority to sign contracts, submit applications, hire personnel, and make operational decisions?

Are investors, lenders, partners, parent companies, subsidiaries, franchises, or affiliated businesses involved?

Are any owners or managers licensed, certified, credentialed, or professionally qualified in a relevant area?

Will the business need a designated qualifying individual, responsible managing employee, licensed professional, or similarly credentialed person?

Are ownership, management, licensing, or control requirements imposed by the industry?

4. LOCATION, SITE & JURISDICTION

Where will the business physically operate? Provide full address if known; otherwise city, county, and state.

Is the location owned, leased, subleased, home-based, shared, mobile, virtual, or still being selected?

Has a lease or purchase agreement been signed?

If a location has been selected, what is the current zoning or permitted use, if known?

Will construction, remodeling, tenant improvements, signage, utilities, fire systems, or accessibility work be required?

Which states, counties, cities, tribal jurisdictions, or other geographic areas may be involved?

5. LICENSING, PERMITS & REGULATORY HISTORY

What licenses, permits, registrations, certifications, or approvals do you already have?

Have you previously applied for any relevant license, permit, or approval? If yes, what happened?

Are there known regulatory issues, violations, denials, inspections, or unresolved requirements?

Are there industry-specific regulators, professional boards, environmental authorities, health authorities, fire authorities, or other agencies you already know are involved?

6. OPERATIONS, STAFFING & FACILITIES

Describe the planned staffing model and key roles.

Will employees or contractors require licenses, certifications, background checks, training, or other credentials?

What equipment, machinery, vehicles, technology, or specialized systems will be required?

What facility, storage, security, waste handling, safety, or environmental requirements are known or anticipated?

7. FINANCIAL & LAUNCH CONSIDERATIONS

What is the approximate startup or expansion budget?

Is funding already available, pending, or being sought?

Are there financing, investor, grant, lease, or contractual deadlines that affect the launch?

What expenses or requirements are currently causing the most uncertainty?

8. DOCUMENTS & EXISTING MATERIALS

List documents you can provide that may help with the research (lease, site plans, existing licenses, business formation documents, agency correspondence, contracts, etc.).

Are there specific documents or agency communications you want Atlandiascope to review?

9. PRIORITIES & EXPECTATIONS

What are the three most important things you need to know or accomplish?

What would make this engagement successful from your perspective?

Is there anything else we should know before beginning the project?

10. CLIENT ACKNOWLEDGMENT

I certify that the information provided in this questionnaire is accurate to the best of my knowledge. I understand that Atlandiascope will use this information to scope research and prepare applicable business-launch services. This questionnaire does not itself create a service agreement or guarantee a regulatory approval, license, permit, funding result, or launch outcome.

Client Name: _____ **Date:** _____

Signature: _____

Return completed questionnaire to: contact@atlandiascope.com